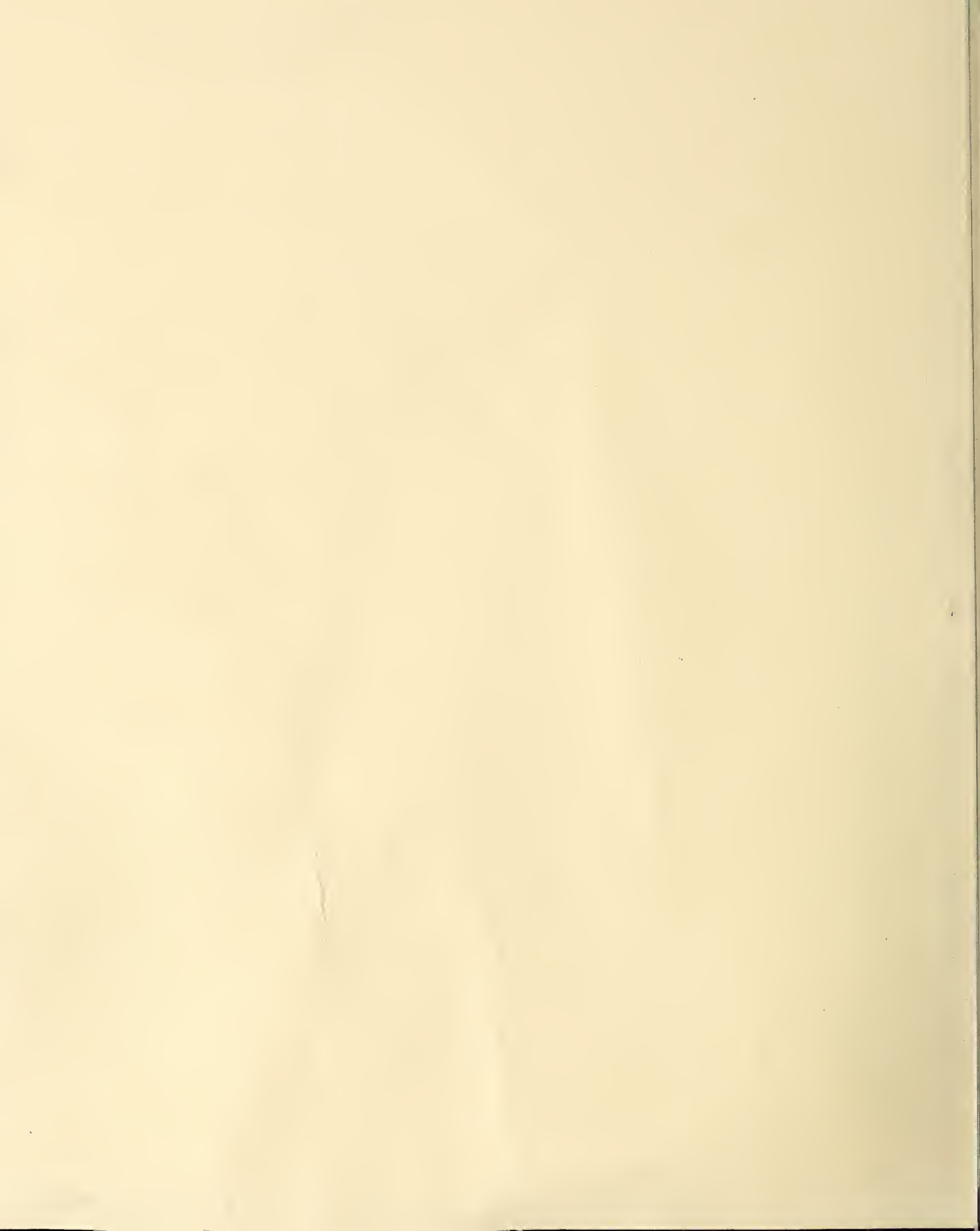


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Prospects for Foreign Trade in

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LIVESTOCK AND MEAT

Foreign Agricultural Service
UNITED STATES DEPARTMENT OF AGRICULTURE
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PROSPECTS FOR FOREIGN TRADE IN LIVESTOCK AND MEAT

SUMMARY

World livestock numbers and productivity have increased sharply since the end of World War II and the increase in world meat production has been moderately greater than the rise in human population. However, world demand for meat has generally continued to rise, reflecting world prosperity, and returns to livestock producers generally continue good.

A continuation of the rise in world meat production and livestock numbers is likely in 1962 and U.S. production of beef, pork, tallow, greases, lard, and bovine hides and skins is expected to rise. But U.S. production of lambs and wool may decline.

World trade in livestock and meat products will continue large during 1962. World trade in meat rose from 4.6 billion pounds in 1955 to 6.5 billion in 1961. Imports by the United Kingdom have remained fairly constant at 3.5 billion pounds but U.S. imports rose from 400 million to over 1 billion pounds. Imports of other countries, mainly in Western Europe, increased from 600 million to over 1.9 billion pounds.

U.S. beef imports are expected to decline moderately from the near record of 1961; U.S. cow slaughter is expected to rise, particularly in the second half of the year. However, the United States is likely to continue to be an attractive market for processing beef and mutton from Australia, New Zealand, Ireland, Mexico, and Central America. The rise in U.S. imports of beef in 1961 was partly due to lower beef prices in the United Kingdom, where domestic production continues to rise because of large subsidies to livestock producers.

U.S. imports of feeder cattle in 1962 should be considerably smaller than the near-record arrivals in 1961. Demand for feeders and stockers in Canada may be extremely strong in 1962 following the severe drought in the summer and fall of 1961 and the unusually large exports to the United States during the last 4 months of the year.

U.S. tallow exports are likely to rise in 1962 and may set another high record. U.S. exports have accounted for about 75 percent of total world exports and nearly half of the domestic production of close to 4 billion pounds.

U.S. exports of lard in 1962 may also rise from their modest 1961 level. The United Kingdom, by far the largest foreign market, decreased its total imports and its share from the United States in 1961 because of reduced supplies and higher prices, but increased its imports from other Western European countries. It will be difficult for the United States to regain its usual share of that market. U.S. exports of lard to Cuba are likely to continue low while the current regime is in power.

U.S. variety meat exports have increased sharply in most recent years and a moderate increase is in prospect for 1962. Exports would probably rise more rapidly if import restrictions on pork products were removed by the United Kingdom, Italy, Austria, and some other countries.

U.S. exports and imports of bovine hides and skins increased in 1961, but the United States maintained its position as a large net exporter and the second largest exporter of cattle hides. Increased domestic slaughter indicates a new record export movement in 1962 even though a further rise in U.S. leather production appears likely.

The Foreign Agricultural Service serves U.S. agricultural interests by keeping abreast of developments in the production, marketing, and utilization of agricultural products in foreign countries and assessing the effect of this competition on U.S. interests. Comprehensive studies are being made of meat production potentials, and marketing developments in the United Kingdom, Ireland, New Zealand, and Australia. Similar studies have been completed for Canada and Mexico.

FAS activities to expand foreign markets for livestock and livestock products increased sharply in 1961. In cooperation with U.S. businessmen, the soap and tallow promotion project in Japan was continued and a promotion program for leather was inaugurated. A market development program for soap and tallow in Colombia continued. A survey of the potential for purchases

of U.S. tallow in South America was completed by an industry-government team. Other highlights of the year included establishment of an office in Italy to promote U.S. sales of tallow, other animal greases, and animal protein feeds in Europe. Promotion of U.S. breeding livestock in foreign countries was accelerated. Market promotion activities were conducted at a number of international food fairs and exhibitions. These activities are expected to increase U.S. trade during 1962.

A large number of artificial barriers limit the movement of livestock products in international commerce. Typical barriers are import duties and other taxes, and import embargoes, import and exchange licenses. Barriers may be established to protect economic interests or to prevent the transmission of animal and human diseases across international borders.

U.K. entrance into the European Common Market will adversely affect U.S. exports of meat animal products, particularly lard and variety meats. The 6 EEC countries in the old union--Belgium, Luxembourg, the Netherlands, Germany, France, and Italy--have already adjusted tariff rates so as to encourage intercommunity trade rather than imports from the United States and other countries outside the customs territory.

CURRENT WORLD SITUATION

Since World War II there has been a strong upward trend in world livestock numbers. During 1961 hog, cattle, and sheep numbers continued to increase to new record highs. World livestock numbers totaled an estimated 2,449 million on January 1, 1961--down somewhat from 2,457 million a year earlier. This total represents a continued rise in cattle numbers, to nearly 1,011 million head, but declines in hog numbers--by about 9 million, to 463 million--and sheep numbers--by about 4 million, to 476 million.

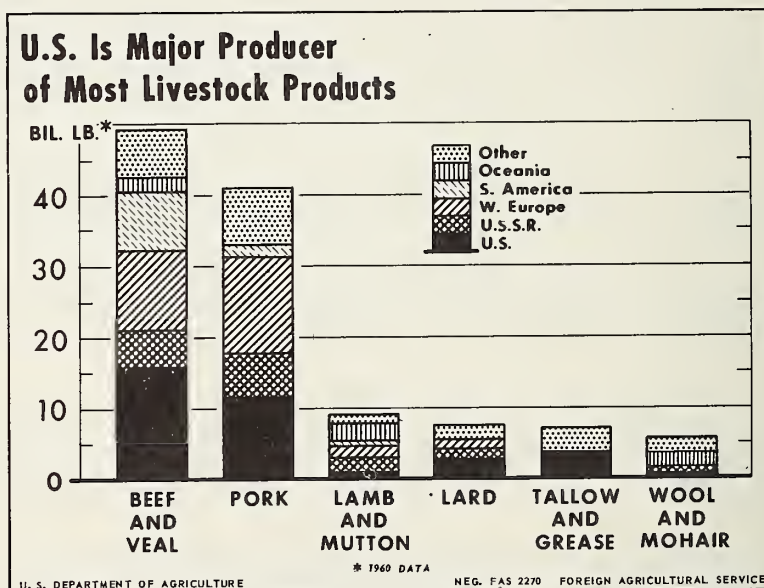
The expansion of cattle numbers has been encouraged by favorable prices and by moderately increased meat consumption, which in turn has reflected a rise in living standards around the world. The temporary decline in sheep numbers was caused by drought in a number of countries in the Middle East and declines in the USSR and Communist China. Numbers are now increasing in Australia, New Zealand, and most important sheep-producing countries except the United States and perhaps China.

Prospect for meat-animal producers continue to be favorable in the world as a whole. Demand is expected to continue strong and prices are likely to be relatively favorable to producers.

Total meat output set a record in 1960; meat production in the 41 countries producing 85 percent of the world's meat totaled 99 billion pounds--23 percent above the 1951-55 average. Output is estimated to have risen still further in 1961, with increases in beef, pork, lamb, and mutton. An even larger production is expected in 1962, reflecting increased livestock numbers.

World trade in meat in 1961 continued at a high level with large imports by the United States, Canada, and Western Europe and large exports by New Zealand, Denmark, the Netherlands, Poland, and Yugoslavia. However, exports from Argentina and Australia were below a year earlier. World trade in 1962 is expected to continue large.

World trade in meat dropped 1 percent in 1960 compared with the previous year, but was still 46



percent above the 1951-55 average. The decline in 1960 resulted mainly from reduced shipments from Argentina, Brazil, and Australia. Among the more important exporting countries that increased shipments in 1960 were New Zealand, Denmark, the Netherlands, France, Ireland, Poland, Yugoslavia, Uruguay, Mexico, and West Germany.

New Zealand was the world's leading exporter of meat in 1960 with shipments of just over 1 billion pounds. Denmark ranked a close second and also shipped over 1 billion pounds. Argentina, normally the world leader, was the third largest exporter. The 10 largest exporters in aggregate accounted for 82 percent of all meat entering world trade during 1960.

The United Kingdom, the world's leading importer of meat, imported 3.5 billion pounds in 1960 compared with 2.7 billion on the average from 1951-55. During 1960, U.K. imports amounted to 54 percent of the total meat entering international trade. During the first 9 months of 1961 the United Kingdom's meat imports were 8 percent below a year earlier, reflecting increased domestic meat production.

TABLE 1.—Meat and livestock products: U.S. and foreign production, consumption, and trade, average 1951-55 and annual 1960, with comparisons

Commodity	Average 1951-55		1960 ^{1/}		Percent change 1960 over 1951-55 ave.	
	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Percent	Percent
Beef and veal:						
Production.....	28,630	12,885	33,427	15,833	+17	+23
Pork:						
Production.....	21,725	10,775	29,367	11,630	+35	+8
Mutton, lamb, & goatmeat production.....	5,590	678	7,507	768	+34	+13
All meat, incl. horsemeat:						
Production.....	56,566	24,338	71,010	28,231	+26	+16
Exports.....	4,197	140	6,195	115	+48	-18
Imports.....	4,184	467	5,456	1,048	+30	+22
Consumption.....	56,553	24,665	70,271	29,164	+24	+18
Lard ^{2/} :						
Production.....	3,170	2,660	4,452	2,568	+40	-3
Exports.....	154	555	282	620	+83	+12
Imports.....	637	---	840	---	+32	---
Consumption.....	3,653	2,005	5,010	1,768	+37	-12
Tallow and greases: ^{2/}						
Production.....	2,553	2,897	3,163	3,827	+24	+32
Exports.....	271	1,024	604	1,725	+123	+68
Imports.....	979	3	1,867	---	+90	---
Consumption.....	3,261	1,589	4,426	1,768	+36	+11
Variety meats:						
Production.....	---	1,676	---	1,924	---	+15
Exports.....	---	30	---	121	---	+303
Sausage casings:						
Exports.....	---	17	---	16	---	-6
Imports.....	---	14	---	16	---	+14
Mohair:						
Production.....	23	14	29.2	24.4	+27	+74
Exports.....	13	2	19.1	13.5	+47	+575
Wool:						
Production (greasy).....	4,237	272	5,196	324	+23	+19
Exports (actual weight)....	2,289	1	2,902	---	+27	---
Imports (actual weight)....	1,859	279	2,429	309	+31	+11
Consumption (clean).....	2,045	448	2,801	407	+37	-9

^{1/}Preliminary. ^{2/}Production excludes estimates for Mainland China.

Second largest meat importer in 1960 was the United States, though its imports declined 23 percent from the previous year. Imports for the first 9 months of 1961, however, showed an increase of 14 percent over the same period the year before.

World output of lard in the major producing countries (excluding Mainland China) for 1961 is estimated at about 7 billion pounds--above the previous year but slightly less than in 1959.

The United States is by far the principal lard-producing country and in 1961 accounted for approximately 40 percent of the world total. Although U.S. production was up slightly in 1961 over the previous year, it was 8 percent below 1959. Lower lard production for the past 2 years resulted from decreased hog slaughter and from smaller yield per hog.

Western European production in 1961 continued the upward trend of recent years, reaching a record level of about 1.3 billion pounds--slightly above 1960 and about 40 percent over the 1951-55 average. Production in Eastern Europe, estimated at 1.4 billion pounds, was slightly larger than in 1960. In the Soviet Union, lard output is believed to have decreased slightly during 1961 but was still 55 percent above the 1951-55 average.

World lard exports in 1961 were below the record 900 million pounds of 1960 because of reduced supplies and higher prices in the United States during the first half of the year. Exports from the United States accounted for approximately 50 percent of the world lard trade in 1961 compared with 70 percent in 1960. The Netherlands and France accounted for all but 7 percent of the remaining trade in 1960.

In recent years the United Kingdom has been the world's major importer of lard, and in 1961 it received considerably over half of the world's lard shipments. During 1960 Cuba was still the second largest importer; in 1961, however, it imported less than half the quantity it received the previous year. West Germany, Peru, and Japan were other important importers of lard. Japanese imports were reduced because of an increase in the lard tariff, effective July 1, 1961, from 5 percent ad valorem to a specific duty of 15 yen per kilo (U.S. \$.016 per pound), equivalent to approximately 15 percent ad valorem.

World production of lard will probably expand in 1962, as hog slaughter is expected to increase generally with the United States accounting for most of the increase. World lard exports may equal the high level of 1960. Large vegetable oil supplies are expected to exert downward pressure on lard prices.

World tallow and grease production in 1961 is estimated at approximately 7 billion pounds, about the same as the previous year but 27 percent above the 1951-55 average. U.S. production continued at the record level of 3.8 billion pounds reached in 1960. The United States is by far the leading producer, accounting for 55 percent of the world total in 1961.

The USSR, second largest producer, maintained production at the high level of the previous year. Production in Australia, the third ranking country, declined somewhat in 1960 and 1961 because of decreased cattle slaughter, but output in 1961 was almost 40 percent above the 1951-55 average.

Production in Europe, where the United Kingdom and France accounted for more than half the output, was about the same as in 1960 or 1.1 billion pounds. Argentina continued to be the principal tallow producer in Latin America, although production declined drastically during 1958-60 because of reduced cattle slaughter. Drought encouraged slaughter in 1961 to the highest level since 1958.

World tallow and grease trade in 1961 probably exceeded the 2.3 billion pounds exported in 1960. As in previous years, the United States dominated the world tallow and grease market in 1961 and accounted for 75 percent of total exports. Australia, New Zealand, and Canada supplied most of the remainder. The USSR became a significant importer for the first time in 1961.

World wool production in 1961 (1961-62 clip in Southern Hemisphere) is estimated at a record level of 5,660 million pounds, grease basis--2 percent above 1960. Australian output rose about 50 million pounds and increases occurred also in New Zealand, Uruguay, and the Republic of South Africa.

World consumption, which established a record in 1959, leveled off in 1960 and increased slightly in 1961.

Carryover stocks in major producing countries on October 1, 1961, were estimated at 96 million pounds, compared with 122 million a year earlier.

Prospects for 1961-62 appear relatively favorable for the industry as a whole. World production is expected to rise at a time when stocks are generally lower than a year earlier and demand for wool manufactures is relatively strong.

World mohair production in 1960 was an estimated 53.6 million pounds--about the same as in 1959. A slight rise to about 57 million pounds was indicated for 1961 as increases in the Republic of South Africa and the United States offset a decrease in Turkish production. These three countries are the world's major producers and exporters.

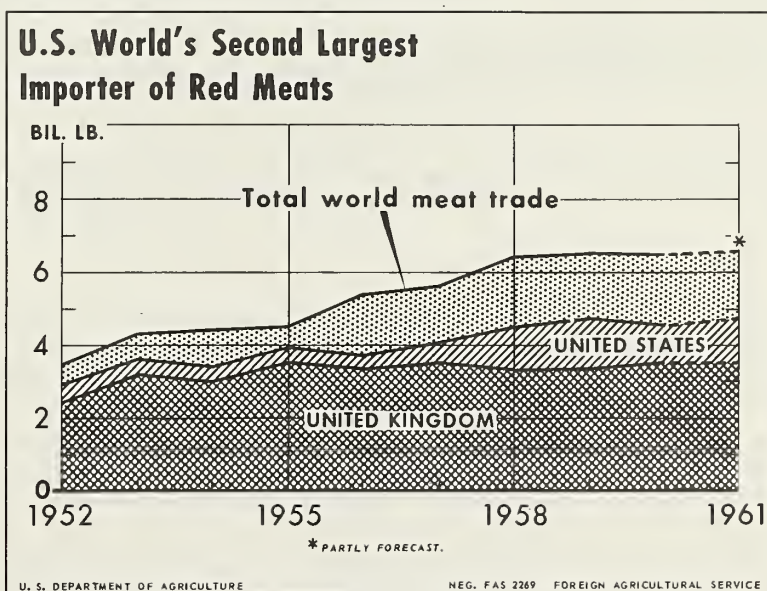
Public Law 87-59 (approved June 27, 1961) provided for reduced U.S. import duties on cashmere goat hair at the level in effect under the trade agreement with Iran until the termination of the agreement. The reduced tariff provided by the law chiefly benefits Iran--the principal import source--but lower duties are enjoyed by all other countries shipping to the United States under the most-favored-nations policy.

U.S. POSITION AND PROSPECTS

Byproducts continued to be the major U.S. livestock and meat products items exported in 1960, accounting for about 80 percent of the \$346 million exported. The total value of tallow and greases, hides and skins, lard, and variety meats approached \$275 million. Tallow and greases made up about 33 percent of the total; hides and skins, 21 percent; lard, 18 percent; variety meats, 7 percent.

1961 exports of tallow and greases, hides and skins, and variety meats were above 1960 totals, while exports of lard dropped below the level of 1960.

Value of imports of livestock and meat products showed a net decline of \$143 million during 1960. The value of beef and veal imports dropped about \$50 million, wool \$37 million, cattle \$21 million, and hides and skins \$16 million. Imports of canned and preserved meats declined more than \$18 million.



Imports of livestock and meat products in 1961 probably totaled more than in 1960. Totals for the first 3 quarters indicated increases in beef and veal, mutton, dutiable wool, and live cattle. The United States imported fewer hides and skins, except kipskins, and smaller amounts of pork and lamb, variety meats, some types of sausage casings, and carpet wool.

Livestock

Cattle numbers in the United States have continued to increase since the beginning of 1958 and are forecast to increase again in 1962. Despite the steady rise in inventories, beef production set new records in 1960 and 1961 and a further rise is likely in 1962. The number of grainfed cattle available for marketing in the United States continued to be very large during 1961. Prices for feeder cattle remained high in 1961 compared with 1960.

Cattle imports during the first 9 months of 1961 were up 31 percent compared with the same period a year earlier. Imports from Canada during the first 5 months were well below those in the same period of 1960, since Canadian prices were relatively high during that period. However, imports from Canada increased substantially during the summer drought. During the same period, U.S. feeder cattle prices reached a level more favorable to Canadian producers, which also stimulated the movement of feeder cattle to the United States. Thus, during the first 9 months of 1961, the United States imported 230,000 head of cattle from Canada compared with 181,000 head in the same period of 1960. Imports from Mexico during January-September 1961 were 326,000 head compared with 255,000 head during the same period of 1960. Cattle imports in 1961 represented about 2 percent of total U.S. cattle slaughter.

Imports of sheep and lambs the first 9 months of 1961 fell substantially below a year earlier. A total of 718 head were imported during the first 9 months of 1961 compared with 49,000 during January-September 1960. Australia supplied nearly all of the sheep and lamb imports during 1960, but did not ship any in 1961. In the first 9 months of 1961, the United States exported 26,118 head of sheep and lambs of which Canada took 25,191 and Mexico 799. The Canadian price support program for slaughter lambs has placed a floor under wholesale lamb prices and to a certain degree is favorable to U.S. sheep producers.

The United States imports a small number of hogs from Canada annually--6,200 head in 1960, compared with 2,400 in 1959. During the first 9 months of 1961, imports fell to 2,325 head, compared with 4,719 during the same period of 1960. Canadian and U.S. livestock prices are interdependent and there is a tendency for livestock to flow in the direction of the most favorable prices between these two countries. U.S.-Canadian tariffs are practically equal for different types of live animals and meats.

U.S. exports of cattle dropped sharply from 50,729 head in 1959 to 27,190 head in 1960 and declined further in 1961. The large exports in 1959 reflected relatively large exports of fed cattle to Canada. During 1960 and 1961 exports of slaughter cattle to Canada returned to more normal levels.

During the first 9 months of 1961 Mexico remained the leading market for U.S. beef breeding cattle. Canada was the second largest, Venezuela was third, and Argentina fourth.¹

Meat

U.S. meat imports in 1960 (carcass weight) totaled 1,048 million pounds or 23 percent below the 1959 record of 1,353 million. They represented about 3.7 percent of total domestic red meat production, against 4.8 percent in 1959. In 1961, imports were somewhat larger than in 1960 but made up about the same percentage of the world total--about one-sixth.

The United States' imports of cattle and beef during 1960 (carcass-weight basis) amounted to 5.9 percent of domestic beef and veal production--well below the 8.5 percent in 1959. In January-September 1961 beef imports were running 20 percent ahead of the previous year, and, as usual, comprised the largest meat import item.

¹U.S. exports of dairy breeding cattle will be discussed in another report in this series, covering dairy and poultry products.

Even though U.S. meat prices in 1961 were generally lower than in 1960, they were still sufficiently high to encourage imports of large quantities of lower grade beef and mutton. These types are used as manufacturing meat and were in short supply owing to the limited number of slaughter cows being marketed in the United States. Australia, New Zealand, and Ireland were large suppliers of frozen beef to the United States during 1961. Argentina, Brazil, and Uruguay were formerly large suppliers of lightly salted beef. There have been no imports from these countries since May 1959 because of the foot-and-mouth quarantine. Australia and New Zealand supplied most of the mutton in 1961. During January-September 1961 mutton imports were running 18 percent above 1960, while lamb imports were 11 percent lower.

A further rise in U.S. beef and veal production is expected in 1962 with a moderate increase in the slaughter of cows. This gain in slaughter is necessary to keep beef and veal production in step with population growth. Beef and mutton imports, however, are expected to continue relatively large, for plentiful supplies will be available in exporting countries at prices considerably lower than in the United States.

U.S. exports of pork to Canada in 1961 were relatively large, reflecting decreased pork output in Canada.

Variety Meats

In 1961, continued large supplies and competitive prices stimulated higher U.S. exports of variety meats. During January-September, exports totaled about 89 million pounds, 3 percent more than during the same months of the preceding year.

Since liberalization of restrictions on variety meats by the United Kingdom in November 1959, there has been a brisk trade in frozen beef and lamb products. U.K. imports from the United States in the first 8 months of 1961 rose to 22.5 million pounds, 33 percent above the same period of 1960, and accounted for 18 percent of total variety meat imports. The United States was the second largest U.K. supplier of beef variety meats and the third largest supplier of lamb variety meats.

U.S. exports of variety meats to France have continued to rise

substantially with the progressive removal of restrictions on this trade. Exports during the first 8 months of 1961 reached 9.2 million pounds compared with 4.9 million a year earlier and 8.0 million for 1960 as a whole.

Lard

Lard exports in 1961 are estimated at the lowest level since 1953--420 million pounds, or 200 million pounds less than in 1960. The U.S. share of the world lard trade in 1961 amounted to only slightly more than 50 percent, whereas in 1960 the United States had shipped about 70 percent of all lard entering world trade.

During the first 9 months of 1961, U.S. exports of lard to the United Kingdom--the principal market--dropped 73 million pounds to 193 million. The drop was especially sharp during the first 6 months, because of reduced supplies and higher prices in the United States. After prices declined in mid-year, the volume increased rapidly, but the total for the year was substantially less than in 1960. U.S. shipments to Cuba--next largest market--fell to 43 million pounds for January-September 1961, compared with 158 million during the same 1960 period. As a result of the break

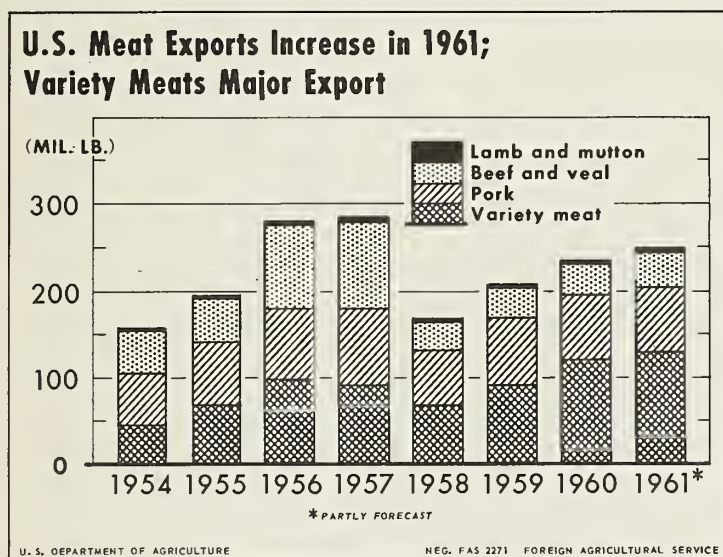


TABLE 2.—Livestock, meat, and meat products: U.S. exports, volume and value, 1958-60

Commodity	Quantity			Value			1960 value as percent of --	
	1958	1959	1960 ¹ / ₂	1958	1959	1960 ¹ / ₂	1958	1959
	Mill. lb.	Mill. lb.	Mill. lb.	Mill. dol.	Mill. dol.	Mill. dol.	Percent	Percent
Beef and veal.....	24.8	27.4	29.4	9.7	10.9	11.6	120	106
Pork.....	54.2	70.9	69.4	20.5	20.9	20.9	102	100
Lamb & mutton (except canned).....	.7	.8	1.5	.5	.4	.7	140	175
Sausage, bologna, & frankfurters.....	4.2	3.5	3.5	2.3	1.9	1.9	83	100
Meat & meat products, canned, n.e.c. ..	5.3	4.5	1.7	1.5	1.1	.5	37	45
Baby food, canned.....	1.7	1.7	2.2	.7	.7	.7	100	100
Horsemeat (all kinds).....	3.9	1.4	1.0	1.1	.5	.3	27	60
Variety meats.....	69.6	91.3	121.1	15.9	19.4	25.2	158	130
Sausage casings, natural, hog.....	8.3	11.0	9.3	8.4	8.5	7.6	90	89
Sausage casings, natural, n.e.c.	8.4	7.4	6.7	3.4	2.6	2.7	79	104
Lard.....	388.9	604.2	620.0	52.3	60.2	60.7	116	101
Tallow and greases ² /.....	1,119.7	1,464.3	1,724.7	97.4	113.1	112.9	117	100
Mohair.....	13.2	18.6	13.5	11.9	21.6	15.6	131	72
Hides and skins.....	9.9	7.9	11.3	53.4	60.1	73.3	137	122
Livestock:								
Cattle and calves.....	1,000 head	1,000 head	1,000 head					
Sheep and lambs.....	25.6	50.7	32.2	7.9	15.7	10.4	132	66
Hogs.....	17.5	21.9	36.4	.4	.5	.7	175	140
	.9	12.7	6.6	.1	.5	.5	500	100
Total.....	---	---	---	287.3	338.7	346.2	121	102

¹/Preliminary. ²/Includes inedible tallow, inedible animal greases and fats, inedible animal oils, n.e.c., neatsfoot oil stock, oleic acid or red oil, and stearic acid.

TABLE 3.—Livestock, meat, and meat products: U.S. imports, volume and value, 1958-60

Commodity	Quantity			Value			1960 value as percent of --	
	1958	1959	1960 ¹ / ₂	1958	1959	1960 ¹ / ₂	1958	1959
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. dol.	Mil. dol.	Mil. dol.	Percent	Percent
Beef and veal.....	477.8	626.2	491.3	152.8	225.0	173.7	114	77
Pork.....	182.7	174.9	171.3	125.8	114.3	115.8	92	101
Lamb and mutton.....	24.0	56.8	49.7	5.5	13.5	10.9	198	81
Other canned, prepared, or preserved	141.4	96.2	21.3	32.5	27.0	8.5	26	31
Variety meats, edible, fresh or frozen.....	2.1	2.3	1.8	.5	.8	.6	120	75
Casings, sheep, lamb, and goat.....	4.9	4.5	5.1	10.2	6.4	7.8	76	122
Other natural casings.....	11.4	10.1	10.6	4.2	3.9	4.7	112	121
Lard.....	---	---	---	---	---	---	---	---
Tallow and greases ²	1.9	2.9	.2	.2	.1	.1	50	100
Wool:								
Apparel.....	65.5	100.6	74.3	60.1	80.9	60.7	101	75
Carpet.....	125.6	191.5	153.9	79.6	123.2	106.2	133	86
Hides and skins.....	49.0	64.6	50.3	49.0	80.8	64.7	132	80
Livestock:								
Cattle.....	1,152.4	708.8	663.2	137.3	88.8	68.2	50	77
Sheep.....	39.8	75.5	49.8	.7	.7	.4	57	57
Hogs ²	9.1	2.4	1.2	.4	.1	.2	50	20
Total.....	---	---	---	658.8	765.5	622.5	94	81

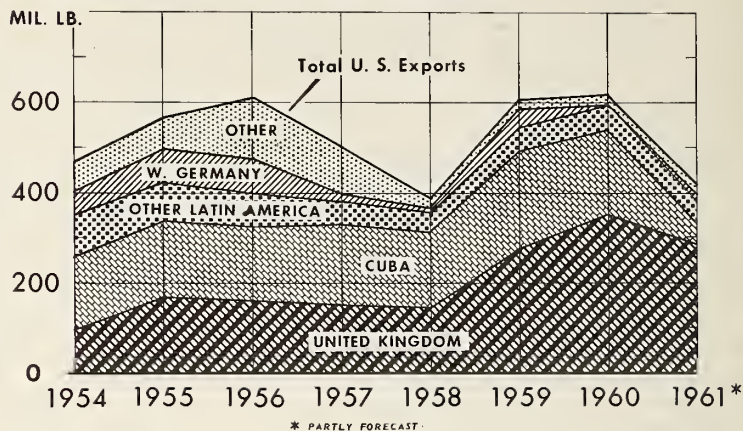
¹/Preliminary. ²/Includes edible and inedible tallow, oleo oil and stearin, animal oils and fats, n.e.c. stearic acid, animal fats and greases, n.e.c., and animal oils. ³/200-pound equivalent.

in U.S.-Cuban diplomatic relations and the limitations on trade with Cuba, exports for the whole year were less than half the quantity shipped the year before. Exports to Western Germany, however, were considerably larger in January-September 1961 than for the same months of 1960.

The decrease in total exports was due to increased production in Western Europe as well as to the relatively high U.S. prices and the decline in Cuban imports. Increased U.S. lard production during 1962 combined with prices averaging below those of 1961 should help to stimulate exports. However, increased hog slaughter in Europe during 1962 will create still more competition in the large U.K. lard market.

U.S. lard is facing tough competition in Europe and in the long run the market is expected to decrease. The European Economic Community is planning to increase the external tariff on lard from the current average of about 10 percent to 20 percent, a move which would tend to price U.S. lard out of the market. Already the Common Market as a whole is a net exporter of lard. West Germany, the only net importer, is a significant market for U.S. lard. France and the Netherlands are the leading competitors of the United States in supplying the other Common Market countries. Even with the present duty, U.S. exporters will face increased pressure as the duty on lard between Common Market countries is gradually reduced to zero.

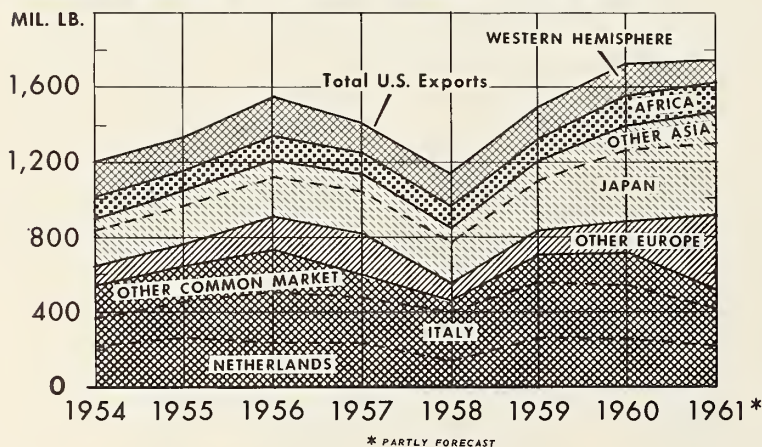
U. S. Lard Exports Decline As Shipments To U. K. and Cuba Drop



USDA

FAS NEG. 2107 REV.

U. S. Tallow and Grease Exports Set Record; Common Market Area and Japan Are Top Markets



USDA

FAS NEG. 2105 REV.

Tallow and Greases

U.S. output of tallow and greases is estimated at about 4 billion pounds in 1961--up slightly from 1960. Tallow exports are estimated at about 1,750 million pounds in 1961, a new record.

This increase in production corresponds to the increase in U.S. slaughter, especially of a higher percentage of fed cattle. Production will increase further in 1962, for slaughter of both cattle and hogs is expected to be at higher levels than in 1961.

The increase in U.S. exports, especially during the first 9 months of 1961, was due to larger shipments to Japan--again, as in 1960, the major market--and to first-time exports of 197 million pounds of inedible tallow to Russia, which became the second most important

U.S. outlet. Total 1961 shipments to Japan are estimated at 390 million pounds--20 percent above the 1960 record. Exports to West European countries lagged during the early months of 1961 as prices averaged several cents a pound higher than in 1960; but exports to the Netherlands and Italy picked up as prices started to decline in July with increased production. Tallow shipments continued high during the latter part of 1961.

Domestic utilization of tallow in the United States has not kept pace with increased production. As a result of a larger proportion of total production has been exported. In 1961 about 45 percent of the output was shipped abroad compared to 35 percent during 1951-55. Increased soap production in other countries has resulted in a continued rise in the use of tallow in soap manufacturing. On the other hand, the increased production of synthetic detergents in the United States has reduced the domestic demand for tallow.

The implementation of the European Common Market is not expected to seriously affect the demand in those countries for U.S. tallow because the proposed EEC import duty is only 2 percent ad valorem.

Casings

Production statistics are not available for natural casings; however, potential production is far in excess of current utilization. World demand has been declining as the use of synthetics continues to grow. Raw material suitable for the manufacture of casings is now used extensively to make tankage for animal feed. The use of synthetic casings is also increasing significantly in some European countries. U.S. imports are mostly casings from sheep and lambs; exports are chiefly casings from hogs and cattle.

The most important markets for U.S. casings include Spain, the United Kingdom, Switzerland, West Germany, and Australia in that order. In 1961 exports to these markets ran well ahead of 1960. During January-September, exports totaled 13.6 million pounds--up from 11.8 million pounds in the same period the year before. Larger supplies of U.S. hog and beef casings will be available for export in 1962.

On the import side, the United States purchased 15.7 million pounds of casings in 1960, mostly from Canada, Denmark, Argentina, Australia, and New Zealand. Imports for the first 9 months of 1961 were well above the same period of 1960.

Hides and Skins

U.S. production of bovine hides and skins rose slightly in 1961 and is headed for a new high. Cattle slaughter during January-September totaled 19.1 million head--about 1.6 percent above the first 9 months of 1960. Production of calfskins during the first 9 months of 1961 was about 160,000 pieces ahead of the same period a year earlier.

Estimates for world production of bovine hides and skins are not available; however, production is expected to be higher in 1961, reflecting increased slaughter.

U.S. exports of bovine hides and skins in 1960 rose 50 percent above 1959, and exports during the first 9 months of 1961 totaled 7.7 million pieces--an increase of 27 percent over the same period in 1960. Exports to Japan--the largest market--were about 27 percent above the 1960 level and 165 percent above 1959. Other important markets were the Netherlands and West Germany.

U.S. production of sheep and lamb skins continued to increase in 1961 and should exceed the 16.2 million pieces produced in 1960.

In 1960 U.S. exports of sheep and lamb skins totaled 2.4 million pieces, compared with 1.9 million in 1959. Exports continued to rise during the first 9 months of 1961, totaling more than 1.8 million pieces compared with 1.6 million for the same period in 1960.

Little change is seen in prospects for hide exports in 1962. As with other raw commodities, such as wool, the longterm outlook is for increased competition from substitute materials that may reduce markets both at home and abroad. On the other hand, there are large areas of the

world where the people cannot afford leather shoes and these markets could consume much larger quantities of leather as consumer incomes and living standards increase.

Wool

The United States on the average imports about half of its annual apparel wool requirements and virtually all of its carpet wool.

Total imports of wool in 1960, clean basis, totaled 228 million pounds--down 22 percent from 1959. Carpet wool imports declined 20 percent and apparel wool imports 26 percent. For the first 9 months of 1961 imports of carpet wool were running at about the same level as 1960 at 123 million pounds, while imports of apparel wool totaled 67 million pounds, an increase of 16 percent.

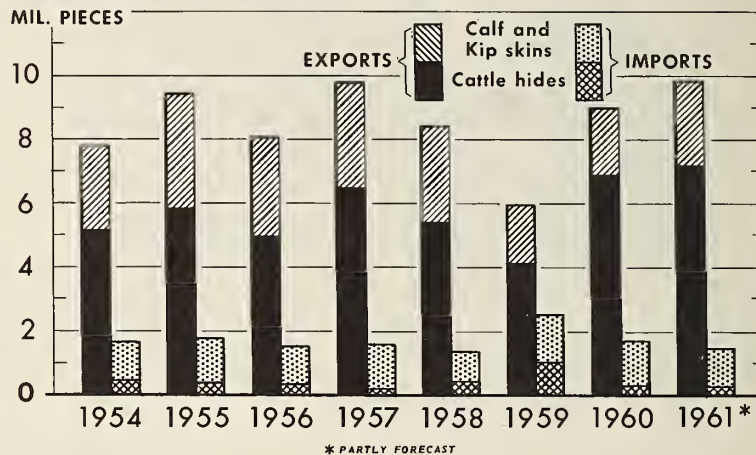
Domestic consumption of wool in 1961 totaled about 500 million pounds--about 7 percent under 1960. Imports of wool products and carpet wool dropped, while mill use of apparel wool remained about the same.

Mohair

World mohair production has been on the increase in the years since 1953, when production was only about 35 million pounds, grease basis, and Turkey was the largest producer. The United States later became the world's largest producer, and still holds that place; its production climbed from less than 13 million pounds in 1953 to more than 24 million in 1960.

The growth of U.S. exports of mohair has been equally rapid. Before 1953 shipments were negligible. Since then there has been an increase in almost every year. In 1960 exports fell to 13.5 million, but 1961 exports may have been several million pounds higher. Shipments during the first 9 months were running 25 percent ahead of the same period a year earlier.

U. S. Exports of Cattle Hides Up While Imports Decline In 1961



USDA

FAS NEG. 2106 REV.

BUILDING WORLD MARKETS

In 1961, efforts were exerted toward the further development and expansion of foreign markets for U.S. livestock and livestock products, especially for hides and skins, lard, tallow, variety meats, and breeding livestock. In the past year, government and/or industry representatives have traveled to most countries in Africa, Central and South America, and Western Europe. Other countries visited included Australia, New Zealand, the Philippines, Hong Kong, Japan, Thailand, and Canada. In all of these countries increased emphasis was directed towards reducing and preferably eliminating foreign trade barriers, and improving the relations between exporters and importers.

Leather.--In Japan, the largest market for U.S. bovine hides and skins, a leather promotional program initiated in 1960 was extended for another 2 years. A market research study was initiated in 1961, designed to evaluate the effectiveness of the current market promotional program and to determine what changes, if any, should be made in the future.



American Polled Hereford Market Study Team observe Grand Champion Polled Hereford Bull at 14th International Livestock Exposition in Montevideo, Uruguay. Left to right -- John H. Royer, Jr., Representative, A.P.H.A.; Dalton Wilson, FAS/W Representative; Don W. Chittenden, Executive Secretary, A.P.H.A.; and Henry L. Buckardt, U.S. Agricultural Attache, Montevideo.

The sale of U.S. leather was stimulated in Germany through a U.S. leather exhibit at the Hamburg Fair. This exhibit consisted of a display of leather products including shoes, belts, purses, and garments made from leather tanned in the United States. Periodic style shows featured garments made from leather.

Tallow.--The soap and tallow promotional program begun in Japan in 1960 continued in 1961. In both years, Japan has been the leading U.S. tallow market. A market research study was also conducted to ascertain the effectiveness of the soap program and to determine consumer buying and consumption habits, attitudes, and motivations, the effectiveness of the promotional media currently employed, and the characteristic pattern of distribution for this product.

The soap promotional program which began in Colombia in 1960 continued in 1961. This program was patterned after the one in Japan.

A 6-week tallow market study initiated in 1961 was conducted by a representative of the U.S. tallow industry in all countries in South American except Chile. The objective was to evaluate existing markets and to encourage the expanded use of tallow in livestock feeds. The representative also reviewed and evaluated current market development activities in this area.

Another tallow market development project in cooperation with the National Renderers Association was signed for Europe during 1961. The project was designed to develop markets for U.S. inedible tallow, grease, and animal proteins in selected European countries, and to provide a regional staff office in Italy for supervision of these activities.

Tallow and other livestock products were also promoted through participation in international trade fairs. In March 1961 the Department, in cooperation with the National Renderers Association, had two booths at the Verona Agricultural Fair, Verona, Italy. The exhibits consisted of a display of U.S. animal fats (tallow) and demonstrations showing how animal fats could be economically added to mixed feeds. Italy has historically been one of the leading export markets for U.S. tallow.

Tallow and soap were promoted in Peru last year through a soap exhibit at the Pacific International Exposition at Lima. Tallow-based soap was featured and one phase of the exhibit included a display of soaps of the world.

Livestock.--In 1961, the tempo for promoting exports of U.S. breeding livestock was increased, and the types of market development programs were more varied than in previous years. U.S.



As a part of the Colombian Soap Promotional Project, Health Authorities instruct children in the use of soap as a basis for good health.



Howard Norton, Director, National Renderers Association, demonstrates
 "Easy way to add fats to feeds" at Verona, Italy, Agricultural Fair.
 John Hamel, Executive Director, NRA, Robert Mannion, FAS Livestock
 Specialist, and Italian Feed Manufacturer, observe operations.

livestock specialists, as in the past, were provided for many of the more important foreign livestock expositions. They not only served as judges, but also classified many herds of cattle for local breeders in the various countries. These specialists explained U.S. breed characteristics and the advantage of using superior breeding stock; visited with government officials, livestock producers and others, encouraging them to use U.S. livestock in their breeding programs; and served as technical advisors to producers. In the past year specialists participated in livestock exhibitions in Colombia, Costa Rica, Ecuador, Panama, Peru, El Salvador, and Venezuela. A Santa Gertrudis official judge and classifier visited Australia, the Philippines, Thailand, Southern Rhodesia, Kenya, the Republic of South Africa, Israel, Portugal, and Spain.

In cooperation with breed associations, groups of foreign buyers have been brought to the United States to purchase high-quality breeding stock. A team from Colombia purchased \$200,000 worth of livestock, primarily swine. A Honduras team bought about \$62,000 worth of breeding cattle for the National Livestock Center of Honduras. A buying mission from Ecuador purchased some Rambouillet sheep.

In July and August a Market Study Team, representing the American Polled Hereford Association, visited Argentina, Uruguay, and Brazil. A second Market Study Team, representing the

American Brahman Breeders Association, visited Colombia and Venezuela and several of the Central American Countries. The purpose of these studies was to determine the potential market for U.S. Polled Hereford and Brahman cattle in the countries visited and to formulate an effective market promotional program for expanding the sales of U.S. breeding cattle.



U.S. Ambassador R. R. Rubottom, Franklin D. Roosevelt, Jr., Representative of American Polled Hereford Market Study Team, and Jack Turner, American Judge, discuss Turner's selection of Grand Champion Polled Hereford at the 75th National Livestock Exposition at Palermo, Buenos Aires, Argentina.

FOREIGN TRADE BARRIERS

During 1961, the overall trend was toward further liberalization of trade policies in foreign countries. A few countries have raised duties or imposed other barriers since the publication of the previous report in this series, but others have made important reductions in their barriers, to the benefit of U.S. sales of livestock and meat products.

Australia has lifted its restrictions against imports of hog casings and now permits them provided a certificate is issued that vesicular exanthema is not known to have existed in the State of origin of the hogs for 12 months prior to slaughter.

About the first of July Belgium removed the import tax of 1.6 cents per pound imposed July 1, 1960, on all pork items.

In December 1960, Colombia reduced the prior deposit required on imports of beef breeding cattle from 20 percent to 5 percent. Previous actions reduced import duties from 20 percent to zero on bulls and from 50 percent to 20 percent on cows and heifers.

Effective April 7, Japan increased the number of livestock and meat items on the Automatic Approval System which permits imports to be licensed without a value limit. The following items were added to the A.A. list: Sausage casings, mutton, tallow, asses and mules, wool and wool tops, alpaca hair, and mohair. On July 1, lard from dollar areas was placed on the A.A. system.

On December 20, 1960, Portugal reduced the import duty on frozen bovine meats, pork, and fatback. However, the reductions were for one year only and may be increased January 1, 1962.

On December 14, 1960, Trinidad suspended the 5-percent luxury tax on imports of certain foodstuffs. Among the items listed were canned specialty meats, which included the following canned meat products: Bacon, ham, tongue, brains, liver, tripe, sausages, ham paste, and lambs' tongues in gelatin.

Trade barriers still in effect are listed by commodity and by country in the pages that follow.

Livestock, Meats, Variety Meats

A number of countries restrict or prohibit imports of U.S. pork products because of the "hog cholera situation" in the United States.

Australia is one of these countries.

Austria practically prohibits pork variety meat imports from the United States for this reason and also because it has a policy of securing a large part of its import needs from East Europe under trade agreements. The government maintains tight import controls over pork, fatback, and canned meats.

Barbados prohibits imports of pork from the United States because of hog cholera.

Belgium prohibits imports of pork products from the United States because of hog cholera and controls the imports of a large number of meat items from all countries under its import licensing procedure. This list includes fresh and frozen beef, fresh and frozen pork, fresh and salted bacon, hams, sausages, salted and dried meats of all kinds, sausage casings, animal stomachs, and fresh and frozen horsemeat.

In Brazil pork products are still in a "special" import category. Imports must be made with dollars purchased at auctions. The premiums which have to be paid for these dollars, plus the tariff duties, make the cost of the U.S. products prohibitive.

British Guiana restricts the entry of pork products from the United States because of hog cholera.

Colombia also excludes imports of pork from the United States, for the same reason.

Denmark too prohibits entry of pork and pork products from the United States because of hog cholera.

France restricts the import of most meats and livestock from the United States. However, imports of certain types of frozen variety meats are permitted. France has one of the highest meat import taxes in the world.

West Germany limits imports of variety meats and fatback from the United States by its import tender system. Imports of variety meats are limited to pork and beef livers and pork kidneys. Imports of most other meats from the United States are not allowed.

Guatemala prohibits imports of some meat items and discourages entry of others by levying high and restrictive import duties.

Haiti restricts meat imports from the United States by use of a luxury foodstuffs tax.

Recent action by the Italian Foreign Trade Ministry has suspended imports of slaughter cattle and beef including beef variety meats. In a second action imports of pork and hogs for slaughter were put on a quota basis with only about 1.5 million pounds each 6 months available to countries other than members of the Common Market and Argentina. Italy has been the world's third largest meat importer in recent years.

In Jamaica, the Trade Board now requires import licenses for pork and all types of pork products originating in, and consigned from, sources other than the West Indies. The United States is a principal supplier of cured pork items, but trade could be affected by the new regulations. Fresh and frozen pork products from the United States are not allowed entry because of hog cholera.

Luxembourg still restricts imports of several livestock and meat products, of which the most important to the United States are pork, bacon, prepared meats and sausages.

The Federation of Malaya imposes a 20 percent ad valorem import tax on baby food containing meat and on sausages not in airtight containers. This action has severely restricted imports from the United States.

Mexico requires a permit for the importation of hogs for slaughter, pork meat (fresh or frozen), raw hams, and hog skins.

New Zealand excludes the entry of pork from the United States because of hog cholera.

Norway practically excludes imports of U.S. livestock products under a royal decree of June 2, 1960, which "embargoed" imports of all live animals, meats, variety meats, and meat preparations. However, these items are permitted to enter from other countries.

In late 1960 the Netherlands imposed an import levy on pork kidneys and other variety meats in what appeared to be a counter move from that of July 1, 1960, when import quotas were removed. The import levy on pork kidneys is equal to nearly 100 percent ad valorem.

Sweden regulates imports of meats and meat products from all areas by licenses and import tariffs. Licenses for import are not issued when domestic production is regarded as satisfactory. Tariffs are flexible and are raised to reduce imports when prices are low. A special tax on imports of horsemeat, beef, and pork is applied to equalize the price of imported meats with those produced domestically. Imports of U.S. pork products are prohibited.

The United Kingdom (except Northern Ireland) technically approves the entry of imports of pork and pork variety meats originating in the 39 States of the United States which outlaw the use of virulent hog cholera virus vaccine. Pork imported from the United States must be produced from hogs which (1) are free of cholera at time of slaughter, (2) come from a state which does not use live virus vaccine, and (3) originate on farms free from cholera for at least 6 months. U.S. packers have not yet found a certification procedure that will satisfy these import requirements, and there have as yet been no imports from the United States.

U.S. canned meats of all types (except poultry) and cooked pork are barred from the United Kingdom by dollar restrictions. Uncooked pork and variety meats are under the veterinary controls previously mentioned. There are no restrictions on imports of frozen carcass and variety meats of beef, veal, lamb, and mutton.

Venezuela limits imports of raw and processed hams and other pork products to encourage domestic processing and increase hog production. Recent additions to the list of items requiring import licenses were sausage, bologna, franks, and bacon.

Lard

In Brazil lard is one of the commodities in a "special" import category. Imports are subject to a duty of 60 percent and must be made with dollars purchased at auctions, at such a high premium as to preclude their use for purchases of lard.

West Germany extended the existing 3.3-million-pound import quota on fatback from dollar areas until the end of 1961. This is equal to about a 50-percent reduction in fatback imports from the United States and Canada from the 1959 levels. Lard with stabilizers added as a preservative is prohibited.

Guatemala limits imports by the use of high import duties.

Italy allows lard imports only when domestic prices of fatback are equivalent to 18 U.S. cents per pound. The Italian support level for hogs is unreasonably high.

Imports into Mexico are on a permit basis and are now about 70 percent below 1958 levels.

Norway "embargoed" lard imports by the royal decree of June 2, 1960.

Imports into Panama are limited by quotas. The duty on U.S. lard is now about 100 percent ad valorem.

During 1961 Peru increased its import duty on lard from 9.5 percent ad valorem to 1.2 soles per kilogram plus 12.5 percent ad valorem.

In April 1961 Sweden free-listed lard, but both import tariffs and compensation taxes are in effect on this commodity.

Yugoslavia, as a result of the rapid expansion of its pork and lard production, imports no lard. Its flexible control system adjusts exports and imports of agricultural commodities according to domestic conditions.

Tallow and Greases

Canada maintains its duty of 17 1/2 percent ad valorem on U.S. tallow, but Australian and New Zealand shipments are permitted free entry, and these countries have become the principal suppliers.

Imports into France dropped sharply in 1961 as a result of direct action by the French Government. The United States could ship large amounts of tallow and greases if the discriminatory import restrictions were removed. Liberalization of tallow trade would have no measurable effect on French livestock prices.

Mexico still severely limits imports of tallow and greases through import permits.

Peru increased its import duty on tallow from .03 soles per kilogram and 12.5 percent ad valorem to .045 soles per kilogram and 13.5 percent ad valorem during 1961. It also increased import duties on oleo margarine and premier jus from .15 soles per kilogram and 12.5 percent ad valorem to .225 soles and 13.5 percent ad valorem.

The United Kingdom has a 10-percent ad valorem tariff on imports from other than Commonwealth countries. Australia and New Zealand are allowed duty-free access to the U.K. market.

Hides, Skins, Casings

Austria still requires special inspection certificates for hides imported directly from the United States or as transshipments from other countries such as the Netherlands or Germany. Hides from condemned animals must not be included. Slaughter plants in the United States must maintain special inspection supervision on shipments to Austria.

The United Kingdom has a duty of 10 percent ad valorem on imports of hog casings from the United States (valued at £10 per cwt. or less). The United States is at a distinct disadvantage in shipping to that market, for Commonwealth countries, which are large suppliers, pay no duties.

THE EUROPEAN COMMON MARKET (EEC)

Some of the countries in the European Economic Community (which is comprised of Belgium, France, Italy, West Germany, the Netherlands, and Luxembourg) have adjusted their import duties in the past year to encourage inter-Community trade rather than imports from outside the Community. The duty on lard imported and packaged in West Germany is 10 percent ad valorem if originating in the United States and other non-EEC member countries but is 7.5 percent for lard entering Germany from any of the other 5 Common Market Countries. Germany is the largest importer of U.S. lard in the Common Market area. The Italian lard duty in 1960 was 35 percent but was reduced to 20 percent in 1961. However, in 1961 the duty on imports from any of the EEC countries was only 16 percent.

The general German import duty rate for frozen tongues, hearts, and kidneys is 10 percent and the rate for EEC countries is 7.5 percent. The general rate for cattle and pig livers is 5 percent but the EEC rate has been reduced to 3.5 percent. Import duties for frozen variety meats have also been reduced in the Benelux countries (Belgium, the Netherlands, and Luxembourg). Whereas the import rate for the United States and other non-EEC countries for frozen pork tongues and kidneys is 10 percent, the duty on imports from other EEC countries is 8 percent. The general rate on other frozen pork offals is 12 percent; the EEC rate 9.6 percent. Beef tongues from outside EEC enter at 10 percent; those from EEC, at 8 percent.

France has reduced its general import duties for inedible tallow and fatback but provides a margin of preference for EEC countries.

At present the United Kingdom is negotiating to join the Common Market. Entrance in the customs union will adversely affect U.S. exports of lard, variety meats, and other livestock products. U.S. sales of lard to the United Kingdom (wholesale value, U.S. ports) totaled almost \$33 million, or more than half total U.S. exports of lard. U.S. exports of tallows and greases to the United Kingdom are relatively small. The duty on imports from the United States is 10 percent, while that for Commonwealth countries is zero. Therefore, the United Kingdom obtains much of its import needs from Canada and New Zealand.

U.S. sales of variety meats to the U.K. in 1960 amounted to \$8,164,000, compared with \$14,267,000 to the 6 EEC countries and \$2,763,000 to other countries.

TABLE 4.—Variety meats, lard, and tallows and greases: U.S. exports to Common Market countries and the United Kingdom, 1959 and 1960, and duty rates, November 1960 and November 1961

Item and country	U.S. exports		Import duties		
	1959	1960	Nov. 1960	November 1961	
				General	EEC
	<u>1,000 dollars</u>	<u>1,000 dollars</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Variety meats:					
Benelux ^{1/}	7,160	6,536	10 or 12	10 or 12	9.6
France.....	852	1,549	15 or 20	2/ 0	0
West Germany.....	5,434	6,173	5 or 10	5 or 10	3.5 or 7.5
Italy.....	0	9	11	15	12
Total, EEC.....	13,446	14,267	--	--	--
United Kingdom.....	5,240	8,164	0 or 20	0 or 20	--
Total, world.....	19,459	25,194	--	--	--
Lard:					
Benelux ^{1/}	192	68	0	0	0
France.....	10	28	32	32	25.6
West Germany.....	4,592	1,978	10	10	7.5
Italy.....	3	1	35	20	16
Total, EEC.....	4,797	2,075	--	--	--
United Kingdom.....	27,526	32,951	0	0	0
Total, world.....	60,210	60,618	--	--	--
Grease (inedible): ^{3/}					
Benelux ^{1/}	6,873	5,789	0	0	0
France.....	269	69	32	32	25.5
West Germany.....	191	122	0	0	0
Italy.....	73	617	0	0	0
Total, EEC.....	7,406	6,597	--	--	--
United Kingdom.....	142	166	10	10	--
Total, world.....	11,367	14,102	--	--	--
Tallow (inedible):					
Benelux ^{1/}	16,256	13,189	0	0	0
France.....	713	1,763	20	15	12
West Germany.....	5,599	6,056	0	0	0
Italy.....	21,702	16,637	0	0	0
Total, EEC.....	44,270	37,645	--	--	--
United Kingdom.....	1,054	2,346	10	10	--
Total world.....	101,762	98,808	--	--	--
Fatback:					
Benelux ^{1/}	--	--	12	12	9.6
France.....	--	--	40	36	32
West Germany.....	4/	4/	10	10	7.5
Italy.....	--	--	22	22	17.6
United Kingdom.....	--	--	10	10	0

^{1/}Belgium, Luxembourg, Netherlands. ^{2/}Temporary reduction in 15 or 20 percent rate. ^{3/}Inedible animal greases and fats, n.s.p.f. ^{4/}Data by country not available, however, Germany is the largest market.

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- "U.S. Exports of Breeding Cattle, July-December and Annual 1960," March 1961 (FLM 2-61).
- "U.S. Trade in Livestock, Meat, and Meat Products in 1960," April 1961 (FLM 3-61).
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- Prospects for Foreign Trade in Livestock and Meat, January 1961.
- "Developing Markets Abroad for U.S. Livestock and Meat Products," Foreign Agriculture, Vol. XXV, No. 1, January 1961.
- Canada's Livestock and Meat Industry, FAS-M-111, February 1961.
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